Thome Aging Well Program

Scaling What's Working

Round II: Webinar

March 14, 2023
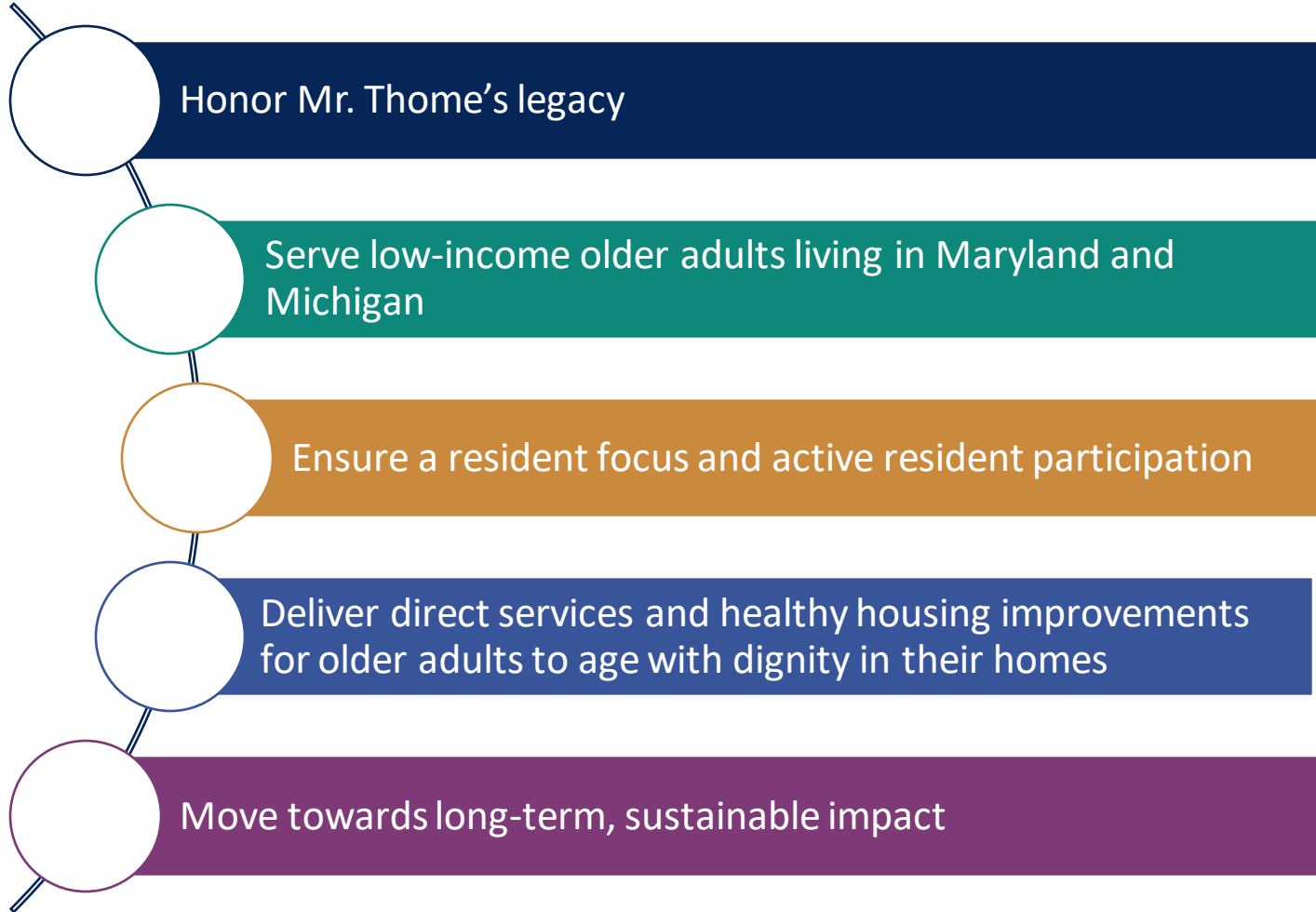
Enterprise

Please introduce yourself in the chat!

- Your name
- Organization
- Location
- What you enjoy most about working with older adults

Thank you to the Edward N. & Della L. Thome Memorial Foundation, Bank of America trustee

Enterprise

Guiding Principles

- Honor Mr. Thome's legacy

- Serve low-income older adults living in Maryland and Michigan

- Ensure a resident focus and active resident participation

- Deliver direct services and healthy housing improvements for older adults to age with dignity in their homes

- Move towards long-term, sustainable impact

Team Members

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Enterprise

Core Values

Core to our work at Enterprise and to the Thome Aging Well Program is a focus on racial equity, authentic community engagement, and evidence-based practice. We are especially interested in proposals that include the following in their design and implementation:

- Older adult voice and leadership
- Demonstrated commitment to diversity, equity and inclusion and addressing or accommodating differences with respect to culture, race, language and/or ability.
- Community partnerships
- Continuous improvement in response to the changing needs of the population served.

Enterprise

Program Overview

Goals

- Improve the health and well-being of older adults with lower incomes in Michigan and Maryland

- Drive innovative strategies aimed at improving the ways in which we care for older adults in this country

Program Elements

- Scale What's Working Grants

- Incubate New Ideas: Innovation Grants

- Learning Collaboratives and Peer Sharing

- Funder Convenings

- Evaluation & Dissemination of Findings

4-Year Timeline

Program Element	2022	2023	2024	2025
Scale What's Working Round I				
Scale What's Working Round II				
Incubate / Innovate Grants				
SWW II Learning Collaboratives				
Evaluation & Dissemination				

Overview

Purpose

To scale proven housing-based services and supports that enable older adults with lower incomes living in Michigan and Maryland to age in place

Period of performance

Up to 24 months

Grantee's award

Award amount: $75,000 - $300,000; average award size of $250,000; a total of $6M will be awarded

Learning collaborative: Participation in a multi-year learning collaborative with other grantees. The curriculum will be co-developed with grantees and incorporate health equity, collective problem-solving and knowledge- sharing.

Evaluation support: Grantees will receive up to 15 hours of optional in-kind technical assistance to support their specific evaluation needs. The TA will be shaped to the expressed needs of the grantees.

Funders convening: Grantees can attend a funders convening to network with funders in the field, share their story, and make the case for continued support of their work.

Scaling Defined

For the purposes of this RFP, we are especially interested in supporting organizations that plan to scale their existing work. Enterprise defines scaling as follows:

- **Scale up:** Increase the number of people served within an existing program site or geographic focus area;
- **Scale out:** Expand an existing program to serve new sites or geographies;
- **Scale deep:** Increase the intensity (i.e., frequency, accessibility, quality, or quantity) of services or supports provided to existing populations or geographies.

Eligible Applicants

Organizational applicants must be

Non-profit or community organizations holding a tax-exempt status under Section 501c3 organization or Organizations that are fiscally sponsored by a 501c3 organization or Recognized governmental entities including state, county, or city agencies such as a health department, area agency for aging, etc. or Tribal Housing Authorities or Tribal Designated Housing Entities (TDHE).

AND

All applicants must

Serve older adults (55 or older) with lower incomes (80% AMI or less) residing in Michigan or Maryland

Eligible Programs

Program Track

Proposals in this track must provide services and/or supports that have proven successful in improving outcomes related to one or more of the following: social engagement; emotional wellbeing; productive aging; physical, mental or financial health.

OR

Built Environment Track

Proposals in this track must use grant funds to modify the built environment to increase safety and/or security through single family housing improvements and/or multi-family housing improvements

Program Delivery

To be eligible for this grant, the new or expanded program must begin serving the proposed population within 3 months of the start of the grant period of performance.

Health Action Plan
(Built Environment Only)

Grantees in the Built Environment Track will have the option to indicate their interest in developing a health action plan to guide their built environment modifications.

This will include partnership with a public health professional and three working sessions in the Fall of 2023.

Grantees choosing to participate in the development of a health action plan can then apply for up to an additional $50,000 to fund priority modifications to the built environment identified through the health action plan.

Grantee Expectations

Grantees will receive half of the grant amount at the start of the period of performance and the second half at the mid-point of the period of performance. As part of their agreement, they will be expected to:

01	02	03	04	05
Execute the proposed activities	Participate in quarterly **check-ins**	Participate in learning **collaboratives**	**Provide an annual report**	**Contribute to Enterprise's efforts to assess key outputs or outcomes**

Timeline

Request for Proposal Release	March 3, 2023
Virtual Office Hours	March 21, 2023, 10 am– 11 am ET March 23, 2023, 1 pm – 2 pm ET. (Built Environment Track Only) March 30, 2023, 2 pm – 3 pm ET
Submission Deadline for Proposals through SlideRoom	April 14, 2023, by 11:59 pm ET
Notice of Awards	On or about June 30, 2023

Application Questions

Appendix E: Eligibility Requirements and Attachments Checklists
(Optional and for Applicant's Use Only)

All proposals must meet the following eligibility requirements to be considered. Please read through each section carefully to ensure that your organization fulfills all the RFP requirements outlined below.

As a courtesy, we have provided checkboxes next to each requirement to help applicants keep track of their application progress. While all requirements must be met, the use of the checkboxes is optional and for the applicants' use only.

I. ELIGIBLE APPLICANTS
Organizations are eligible for funding as an individual applicant or as the lead applicant for a group of partner organizations if they meet the following criteria. **NOTE:** Previous Thome Scale What's Working Grantees are **NOT** eligible to apply for Round II of the Scale What's Working grants.

	The applicant or lead applicant is one of the following entities: • Nonprofit or community organization holding a tax-exempt status under Section 501c3 organization or • Is fiscally sponsored by a 501c3 organization or • Is a recognized governmental entity including state, county, or city agencies such as a health department, area agency for aging, etc. or • Is a Tribal Housing Authority or Tribal Designated Housing Entity (TDHE)
II. ELIGIBLE PROPOSALS	
Proposals are eligible for funding through this grant opportunity if they meet the following criteria:	
A. Population Served (All Criteria Must Be Met)	
	1. Older adults who are aged 55 or older
	2. Older adults with household incomes that are 80% AMI or lower
	3. Older adults who live in Michigan or Maryland
Preference will be given to proposals that request funding to support those who belong to a community or group that has and is continuing to experience persistent health inequities. This may include the following including:	

Application Questions

Organization Information

- Organization:
- Address:
- Website:
- Organization Type: (Options: Non-profit or community organization holding a tax-exempt status under Section 501c3 organization, is fiscally sponsored by a 501c3 organization, is a recognized governmental entity including state, county, or city agencies such as a health department, area agency for aging, etc., is a Tribal Housing Authority or Tribal Designated Housing Entity (TDHE)
- Please select the states with populations served by your organization. (Options: Maryland, Michigan, Michigan and Maryland)
- How many years has your organization been in business?
- How many unique or unduplicated adults aged 55 and older did your organization serve between January 1 and December 31, 2022?
- Please indicate the total organization annual operating budget as of December 31, 2022.
- Which of the following best describes the race and ethnicity of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Which best describes the gender of your organization's Chief Executive Officer, Executive Director, General Partner, or Managing Member?
- Do more than 50% of your organization's board members identify as Black, Indigenous, or as People of Color (BIPOC)?
- Does the Chief Executive Officer, Executive Director, General Partner, or Managing Member of your organization identify as a member of the LGBTQ+ community?
- Built Environment Track Only: If awarded, would your organization plan to participate in the optional health action plan and learning sessions? (Please see Scale What's Working: Round II Awards for additional context) (Options: Yes, No, N/A)

Application Questions
Contact and Partner Information

Contact Information

- Primary Contact First & Last Name:
- Primary Contact Title:
- Primary Contact Phone:
- Primary Contact E-mail:
- Secondary Contact First & Last Name:
- Secondary Contact Title:
- Secondary Contact Phone:
- Secondary Contact E-mail:

Partner Information

List the following information **for each** partner organization included in the proposal (if applicable).

- Name of Partner Organization:
- Address of Partner Organization:
- Primary Contact First & Last Name:
- Primary Contact Title:
- Primary Contact Phone:
- Primary Contact E-mail:

Application Questions
Proposal Overview (30 Points)

1. Select your proposal track from the drop down. (Options: "Programs," or "Built Environment")
2. Share your proposed goal. The goal should be SMART (specific, measurable, achievable, relevant, and time-sensitive) (1500 characters).
3. Describe your planned activities along with a detailed timeline. (4000 characters)
4. Detail your staffing plans. Indicate if you will need to hire new staff to carry out your proposed activities. If new staff are required, share your hiring plan and contingency plan in case of hiring delays. (3000 characters)
5. Submit a video that illustrates the need for your proposed activities. (5 minutes or less)
6. Insert one attachment to illustrate the evidence base that supports your proposal. A description of eligible attachments is provided in the RFP in Chart II Application Attachments.

Application Questions
Core Values (15 points)

7. Describe how the proposal identifies opportunities for older adults with lived experience to play a meaningful role in the design, implementation, and outcome of the proposed activities. (1500 characters)
8. Describe how the proposed activities either address or accommodate differences with respect to culture, race, language and/or ability. (1500 characters)
9. Describe how the proposal outlines ways in which the proposed activities will leverage partnerships between organizations committed to enabling older adults with lower incomes to age in place. (1500 characters)
10. Describe how the proposal outlines specific methods for gathering feedback on how the proposed activities are meeting the needs of the population served. (1500 characters)

Application Questions
Population Served (25 points)

11. Please list the counties that will be served by the proposed activities. (2000 characters)
12. If you serve a smaller geography within a county, please indicate it here (e.g., incorporated townships, villages, cities, or sub-sections thereof.) (2000 characters)
13. Describe the resident population you will serve, including age, income range, race/ethnicity, prevalent languages spoken, and any other relevant characteristics. Priority populations are described in the "Eligible Proposals" section of the RFP. (2000 characters)
14. Summarize the need(s) for the proposed activities. We encourage you to provide data in your description. Data may include statistics, study results, other information from neutral and reliable sources, and/or your own organization's surveys and/or needs assessments. (3000 characters)
15. Describe the consequences should your proposal not be funded. Include any factors that could potentially increase community need (e.g., the elimination of benefits, increased climate events, etc.) (3000 characters)

Application Questions
Expected Impact (20 points)

16. Describe how you plan to scale your current activities using the following definitions: (1) Scaling Up: Increasing the number of people served within an existing program site or geographic focus area; (2) Scaling Out: Expanding an existing program to serve new sites or geographies; (3) Scaling Deep: Increasing the intensity (i.e., frequency, accessibility, quality, or quantity) of services or supports provided to existing populations or geographies; or (4) We define our project scaling differently (please specify). Provide details including your expected outcomes and proposed number of people served. (3000 characters)

17. Explain how you will ensure that the proposed activities meet the needs of your targeted population. (2200 characters)

18. Describe how the population served will continue to benefit from the proposed activities once the grant has ended. Some examples may include built environment modifications, partnerships, resident or staff training. (2200 characters)

Application Questions
Financial and Organizational Information (10 points)

19. Complete and attach the budget template (download template [here](#)).
20. Attach 501c3 Letter of Determination. Applicants must have 501c3 status at the time the proposal is submitted. A pending application to secure 501c3 nonprofit status will not be accepted as a substitute. For government entities that are not organized as a 501c3 entity or for tribal designated housing entities, please provide documentation related to tax status or authorized formation or designation.
21. Attach signed Enterprise Standard Terms and Conditions (download template [here](#)). Applicants must provide a signed copy of Enterprise's Standard Terms and Conditions. Signatures must include the organization's board president and Chief Executive Officer, Executive Director, General Partner, or Managing Member.
22. Attach Audited Financial Statements. Applicants must provide their most recent audited financial statements. If your organization does not have audited financial statements, please submit company certified financial statements.
23. Attach IRS W-9. Must be completed and signed.
24. (Only for partnerships): Attach signed Memoranda of Understanding or Agreement. If applying as a group, the group must have a formal written partnership agreement in place clearly outlining roles and responsibilities of all partners involved.
25. Attach a State Issued Certificate of Good Standing. Applicants must provide a recent (within 30-days) state certificate of good standing. Organizations that are not in good standing will not be considered.

Application Attachments

I.   BUDGET ATTACHMENT

     A.   BUDGET TEMPLATE

     B.   DOCUMENTATION OF INDIRECT COSTS

II.   ONE EVIDENCE-BASE ATTACHMENT

     A.   CASE STUDIES

     B.   OUTCOME DATA

     C.   PROGRAM PERFORMANCE DATA

     D.   DOCUMENTATION OF SUCCESSFUL IMPLEMENTATION

III.   IMPACT VIDEO

     A.   NO MORE THAN 5 MINS IN LENGTH

IV.   FINANCIAL ORGANIZATIONAL DOCUMENTS

     A.   501C3 LETTER OF DETERMINATION

     B.   SIGNED ENTERPRISE STANDARD TERMS & CONDITIONS

     C.   AUDITED FINANCIAL STATEMENTS

     D.   STATE ISSUED CERTIFICATE OF GOOD STANDING

     E.   IRS W-9

     F.   MEMORANDA OF UNDERSTANDING/AGREEMENT

Thank you for joining!

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